

As with the client site project, establishing written guidelines regarding how advocate site content is to be gathered, analyzed, formatted and maintained is an essential project management tool. This article identifies issues that you may wish to address in your state's content development process. (This article will be most helpful when used in conjunction with the Sample Work Plan for Advocate Site article.)

A Few Words on the Planning Process

Before beginning to collect and develop content for your site, step back and take some time to reflect on a number of issues related to your advocate site. Identify the goals of your advocate site, the site's target audience, and your project partners.

- Is your goal to increase volunteer recruitment, to foster better coordination among legal services attorneys, etc.?
- Will your audience initially include only legal services attorneys, or be broader?
- What are the goals and needs of your partners?

This planning will help you prioritize and focus your content development activities. It may be helpful to put together a work plan and timeline to clarify expectations, scope of work and deliverables. This is especially true when administrative responsibilities are to be shared among multiple host organizations.

Content Development

You will need content for various sections of your advocate site, including your Library, Calendar and News pages. Focus first on content that will be most helpful to your program and/or volunteers (keeping in mind the goals and audience identified in the planning phase). Rather than asking your colleagues to produce new materials to populate the site, your first task should be to analyze *existing* work flows/product. Some questions that will aid in identifying this work product are:

- What do your colleagues and volunteers produce in the normal course of their work that would be suitable for the web site?
- What resources do they currently share, both off and online?
- Are there key resources that all attorneys/volunteers use or that you give out at trainings?
- What news sources would be helpful to your advocates? Which organizations conduct trainings?
- Do they produce materials for them?
- Are there listservs that exist that all advocates should join?

Think broadly and creatively, and don't forget volunteer work product! Finally, it may be advisable to focus initially on a small number of substantive areas so as not to become overwhelmed.

Here are some issues you should consider in the content development process:

Collection. You must decide how content will be collected. Will people send you documents, either by email or in hard copy? Will you ask people to post documents directly onto the web site? Will you form committees of attorneys to develop specific

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topic areas? Will you enlist students to visit your colleagues, disk in hand, to collect materials from their hard drives? You may decide to use a combination of methods.

Remember that for each document, you will need to collect certain descriptive information and settings preferences from the contributor. (These required descriptive information and settings preferences are listed in Appendix 1.)

Organization. Once you have started to gather content, you will need a way to keep it organized offline first. Consider using one of the content collection spreadsheet tools referenced at the end of this document.

Don't overlook potential assistance from law firms and/or students! They can play a major role in identifying materials, as well as formatting, redacting and/or posting documents. For ideas, see the Additional Resource Materials referenced at the end of this document.

Library Structure. Plan out your library folder structure as much as possible before you begin posting documents to your advocate site! You may find it helpful to create a sample folder structure on your hard drive where you can also store documents you have collected. Our experience has shown that it is best to keep things simple in the beginning. You may change your mind about the folder structure, and the more complex the structure, the greater the effort involved in changing it later.

When planning a folder structure, remember that the default view of the Library is by folders; however, users will also be able to view the Library by Topic. Therefore, consider organizing your folders in a different, helpful structure. When designing the folder/subfolder structure, keep in mind how many subfolders a user will have to click down to find a resource. Find a good balance between forcing a user to click down and organizing your content well.

Analysis. Once you have gathered the majority of your content, identify gaps and decide how to deal with duplicative material. Ideally content gaps will be filled on a rolling basis. Several states have found it useful to form working groups for individual substantive areas to complete this analysis. Or recruit one attorney in each substantive area to review the content with you for an hour.

Document Formatting & Posting. For each document collected, you must decide if the existing format is useful or if it needs to be converted to other formats. The formats in which content can be posted include: Word (doc), WordPerfect (wpd), Excel (xls), PowerPoint (ppt), Adobe Acrobat (pdf), and HTML, among others. Some formats are preferable to others depending on how a document will be used. You may wish to post documents in multiple formats to accommodate the preferences and accessibility needs of your users.

Here is an overview of the various document formats:

- **HTML** is the default format for the Web. It is a great format for documents that a user will most likely read only online through their browser. (The probono.net system uses the ActivEdit editor to create HTML documents online.) Examples include FAQs, agendas or directions. HTML documents are not downloaded onto the user's computer, but are viewed through a web

browser. The user may save the window display as an HTML document on his or her desktop. HTML is also a good format for large manuals that a user may wish to view online – this is an area where you might like to enlist a law firm to help with the conversion process. An HTML manual with a clickable table of contents enables a user to navigate through the manual to find what he or she needs. If there is a chance that the user might also want to download the manual, you may choose to post it in another format as well.

- **Word Processing Formats (WordPerfect or Microsoft Word)** are best for content that you want the user to download and manipulate. Examples include court forms, model pleadings, and sample briefs. When posted to your advocate site in this format, the user downloads a copy of the document onto his or her hard drive, and can then edit it to meet his or her needs.
- **PDF** format allows you more control over the look and feel of a document; the document viewed and downloaded by the user is an exact reproduction of the original source document. PDFs are generally more printer-friendly than HTML documents. Users can also copy and paste text from a PDF document into a word processing document with some loss of formatting. PDFs can be large files however, and may take a long time to download. To avoid downloading problems, it is advisable, where possible, to break up larger PDFs into smaller chunks. Government forms are also best posted in PDF format, because they should be used in the exact format dictated by the government agency that created them.

Wherever possible, PDFs should be OCR (optical character recognition) format. This will enable the document text to be included in searches. Additionally, users accessing your site with assistive technology cannot read PDF files unless they are in OCR format. If an OCR version is not available, it is advisable to provide an HTML version to accompany a PDF document where possible.

- **Conversion of Hard Copy Documents** - The length and/or importance of a document will govern the approach you take to converting hard copy documents into electronic format. Scanning is one option. If scanning a document, make sure you use OCR format. Scanning into word processing format is also an option with certain software; however results usually require clean up. Some probono.net practice areas have recruited law firm word processing departments to help with this conversion.
- **Links** - When uploading links to other web sites, be sure to **deep link**, that is, to link to a specific area on a web site. For example, don't send the user to www.hud.gov homepage — provide a link to the exact location that contains the relevant information.

Be aware that some web sites use **frames**. A frame is an area on a web site that acts as an independent browser window. You can tell that a website employs frames if the URL doesn't change when you navigate from page to page. This makes it difficult to capture a URL for the exact place on the site you wish to direct users, so be sure to give clear instructions on how to navigate to the relevant information.

Note: in general, you do not need to ask for permission to deep link as it is a very common web practice. Most sites are very pleased to capture the traffic (and recognition) caused by linking. However, some sites have started to put in their Terms of Use a request that folks ask for permission before deep linking, so it is a good idea to read a site's Terms before linking to it.

Content Maintenance

The benefits of your content development efforts will be short-lived unless a system is in place for keeping the content accurate, up to date, and relevant to your audience.

On a regular basis (monthly, quarterly, etc) use the online Admin Inbox content management tools to flag content up for review. When content is first submitted, identify who will update it when the time comes. You may consider assigning blocks of content to individual organizations, or setting up an “adopt a document” program where advocates take responsibility for updating individual documents. It is important to have a system in place to ensure that those who have said they will update content do so, or to reassign updates to new volunteers in cases where the original author is unable to complete the update.

In addition to keeping material up to date, content maintenance should include ongoing content development. Wouldn't you stop your subscription to a magazine if it featured the same stories each month? Think of your advocate site in the same way. Ideally your advocate site will feel more like a dynamic publication than a virtual filing cabinet. Keep it fresh by soliciting feedback from the site's users to find out what new content they would like to see. Review the search terms entered to see what content users need that is not on your site. Revisit gap areas identified in the content collection process. Be open to new partnerships and always be on the lookout for ways to enhance your site.

Content Protocols

Given the complexity of maintaining continuity among and standards for quality control for a large number of documents, it is critical to develop and implement a set of content protocols. Your protocols should address the issues discussed in this document, specifically how content is to be reviewed, formatted, and updated.

Having a content protocol will ensure consistency of the content on your site. Articulating a process also eliminates confusion about roles and responsibilities, especially if you plan to divide up administrative responsibilities. Finally, formalizing the process and educating stakeholders about it will manage expectations and avoid frustration.

Put your protocol in writing. Writing it down will force you to think through details of your plan. It is also an effective way to educate others involved in the project, especially newcomers. Finally, having a written plan helps minimize disruption in the event of staff changes.

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Additional Resource Materials

SWEB Support Site Library > Advocate Site Start Up > Practice Area Planning Tools folder contains some of the resources below as well as some samples from states.

Content Collection Tools

<http://www.probono.net/link.cfm?180>.

Law Firm Role in Pro Bono Net Practice Area

<http://www.probono.net/link.cfm?1277>

Utilizing Interns, VISTA volunteers and summer associates

http://www.lstech.org/ntap/trainings/training_topics/SWEB/SWEB107

Sample Advocate Site Work Plan

<http://www.probono.net/link.cfm?426>

IllinoisProBono.org Usability Report

Results detailed the type of content pro bono attorneys really want.

<http://www.probono.net/link.cfm?2639>

Appendix 1: Information that should be collected for each library document

*Most fields are viewable by practice area members when they submit content online. Only site administrators can view and input data into fields marked with an asterisk.

Title

Titles should not depend on the library folder in which a document is posted, as documents will not appear in those folders when users view the library by topic or in search results.

Description

The description should give users a clear idea of what issues are addressed by a document. This field is included when a user performs a search, so you may wish to include key words in your description to increase the likelihood of users finding the documents they need.

Document Type

Set list of document types such as Article, Brief, Training Materials, Case Law, Forms, etc.

Creation Date

Defaults to the date the document is entered into system but can be changed if needed.

Review date

This date should reflect when the document will need to be reviewed and updated. Library content can be sorted by review date in the admin inbox to assist with this process.

Author

Can capture both the organization and actual author name. This is included when a user performs a search, so users can find documents by author.

Folder*

Choose which folder to post the resource. Library resources may only be posted in one folder at a time.

Member type restrictions*

In addition to the general password protection of your advocate web site, access to content can be further restricted by "member type." Each registered member of your practice area is assigned a "member type" (e.g., civil legal aid, pro bono, law student, etc.). Content can then be restricted according to member type. For example, a document restricted to legal aid members would not display when a law student or pro bono volunteer views the Library.

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Permission to share*

The probono.net system allows for resources to be shared between password protected practice areas through the search tool. Thirty states and territories across the U.S. are building practice areas on the Pro Bono Net system. Member type restrictions are upheld when content is shared. Content contributors should indicate whether content may be shared with other practice areas.

Topics*

You must tag content with at least one topic or subtopic; however you may tag a document with multiple topics and/or subtopics to increase the likelihood of users finding the documents they need.